

Money Dashboard Location		New Financial Dashboard Location
MONEY	Account, Account Summary and Fund Reports	State: State Funds > State - Summary RF: Research Foundation Funds > RF - Summary UBF: UB Foundation Funds > UBF - Summary Fund Summary Line Budget Revisions OEC and FTE
		Fund Summary > Fund - Funding Source Account Summary > Account Summary - Summary State Funds > State - Personal Service State Funds > State - Allocation State: State Funds > State - Account Summary
		RF: Research Foundation Funds > RF - Grant Summary FTE Summary: State Funds > State - Personal Service
		State Funds > State - IFR/SUTRA State Funds > State - IFR Salary Recovery
	Fees	Financial Home Page
	IFR Salary Summary	
	Reports and Information	
Account Management Dashboard Location		New Financial Dashboard Location
ACCOUNT MANAGEMENT	Action Items	Financial Home Page > Alerts
	Links	Financial Home Page > Forms and Links
	Percent of Allocation	Financial Home Page > Supplemental Reports
	Projected Accounts in the Red	Financial Home Page > Alerts
	Budget Status	State: State Funds > State - Summary RF: Research Foundation Funds > RF - Summary UBF: UB Foundation Funds > UBF - Summary
		State Funds > State Allocation
	Budget Revisions	Financial Home Page > Alerts
	PSR Balance	State Funds > State IFR / SUTRA
	Revenue	State: State Funds > State - Non-Personal Service
	Open Encumbrances	RF: Research Foundation Funds > RF - Grant Expenditures
	Payroll Audit	Financial Homepage > Alerts and Supplemental Reports
	Line Maintenance	* This report can be found on the Staff Management dashboard.
	Information	Financial Home Page

Glossary of Terms

Operational Data - Data Reported based on the business rules of the source business system.

Strategic Data - Data reported utilizing business rules designed by UB business offices to better define and report financial data. For example, IFR Fringes are stored as contra-revenue in the State financial system but reported as an expense in the UB Strategic data.

Actuals - Expenses that have been processed and is applied to UB accounts. Actuals **DO NOT** include encumbrances.

Sources - Revenues and allocations used for purchases, staff payrolls, etc. It is comprised of revenue for revenue-based accounts like IFR, SUTRA and UB Foundation accounts; budget for Research Foundation accounts and fiscal allocation for allocation-based accounts like State Operating.

Uses - Expenditures plus encumberances applied to UB accounts.

Available - Sources minus uses.

Customizing Reports

Right click any field to:

- Sort your data
- Show subtotals
- Show row level grand totals
- Include and exclude columns
- Reorder columns
- Move columns to other areas (prompts or selections)

- Sort Column
- Keep Only
- Remove
- Show Subtotal
- Show Row level Grand Total
- Exclude Column
- Include Column
- Move Column



STRATEGIC FINANCIAL

Strategic Financial Dashboard Location	New Financial Dashboard Location
All Funds Summary Report	Fund Summary > Fund - Funding Source
Campus Financial Plan	* This report can be found on the Commitment Management dashboard.
Trend	Trend > Trend - Fund
	Trend > Trend - Organization
Unit Profile	Fund Summary > Fund - UB Code
	Fund Summary > Fund - Funding Source
Expenditures	Fund Summary > Fund - UB Code
Fees	State Funds > State - IFR / SUTRA
Operating Reports	Operating Reports > Operating Statement
	Operating Reports > Operating Sources
	Operating Reports > Operating Uses
Information	Fund Summary > Fund - NACUBO
	Financial Home Page

MONEY MANAGEMENT

Money Management Dashboard Location	New Financial Dashboard Location
Reports	State: State Funds > State - Account Summary State Funds > State - Non-Personal Service
	RF: Research Foundation Funds > RF - Grant Summary
	UBF: UB Foundation Funds > UBF - Fund Summary
	IFR: State Funds > State - IFR / SUTRA
	Line: State Funds > State - Personal Service
Current Condition	* A selection of these reports can be found on the Procurement dashboard.
State Summary, Allocation and Expenditures	State Funds > State - Account Summary
State PSR	State Funds > State - Personal Service
State Temporary Service	State Funds > State - Personal Service
State IFR Summary	State Funds > State - IFR / SUTRA
IFR Salary Recovery	State Funds > State - IFR Salary Recovery
State Checkbook	State Funds > State - Checkbook
RF Summary	Research Foundation Funds > RF - Grant Summary
RF Expenditures	Research Foundation Funds > RF - Grant Expenditures
UBF Summary	UB Foundation Funds > UBF - Summary
UBF Expenditures	UB Foundation Funds > UBF - Expenses

Frequently Asked Questions

Q. How do I fix data that isn't displaying correctly?

1. **Refresh the page:** Click the **gear icon** in the upper right and then click **Refresh**.
2. **Clear any customizations:** Click the **gear icon** and then click **Clear My Customization**.

If the above steps don't work, submit a ticket in the Business Services Support Hub.

Q. How do I find missing columns that were on the previous dashboard?

- On any SIRI dashboard, right-click a column heading to open the customization menu.
- From there, you can access additional options; many have expanded settings available via the submenu.

Q. How do I save my dashboard customization?

1. **Set up the dashboard page:**
 - a. Apply your desired filters.
 - b. Adjust the column display (include/exclude, reorder, add subtotals, etc.).
 - c. Click **Apply** to view the changes.
2. **Save the customization:**
 - a. Click the **gear icon** and then click **Save Customization** to store your current setup.
 - b. Type a name for easy reference.
3. **Apply or Set as Default:**
 - a. You may apply a saved customization anytime.
 - b. Optionally, you may set it as your default view for that dashboard page.

SIRI Resources

Looking for additional resources about SIRI? Visit the **SIRI website!**

buffalo.edu/siri

Contact the Business Reporting
and Systems SIRI Team

For special report requests, modifications to existing reports or dashboards or questions
about the SIRI Tool or the data, please submit a ticket in the Business Services Support Hub.
ubuffalo.teAMDynamix.com/TDClient/49/Portal/Home/

